

## User Access & Certification Administration

### What is User Access & Certification?

The User Access & Certification web based application allows users with specific security categories the ability to create and process new ePM user accounts.

The **User Access** tab consists of three (3) pages, *User Request*, *User Approval* and *Workspace Access*

1. **User Request** page provides the ability to create/submit new ePM user accounts for licensing.
2. **User Approval** page provides the ability to approve/reject new user accounts, enter /attach clearance documents, process waiver requests and license new user accounts.
3. **Workspace Access** page provides the ability to grant and/or request workspace access.

### Who Will Use This?

- ✓ GSA Project Manager
- ✓ GSA Program Certifiers
- ✓ GSA ePM Regional System Administrators
- ✓ GSA ePM National System Administrator
- ✓ GSA Waiver Reviewer
- ✓ GSA Waiver Approver

The application also facilitates the annual User and Project certification process (See QRG.124 for more information on Creating a Certification Period)

To perform the operations listed in this QRG

Log into the User Access & Certification application using your ePM credentials.

<https://epm.pbs.gsa.gov/useraccesscertification>



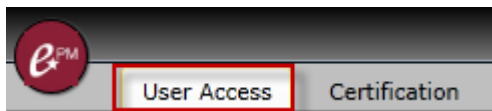
Note: Log into the User Access & Certification application using your ePM User Credentials (password is case sensitive)

## User Request

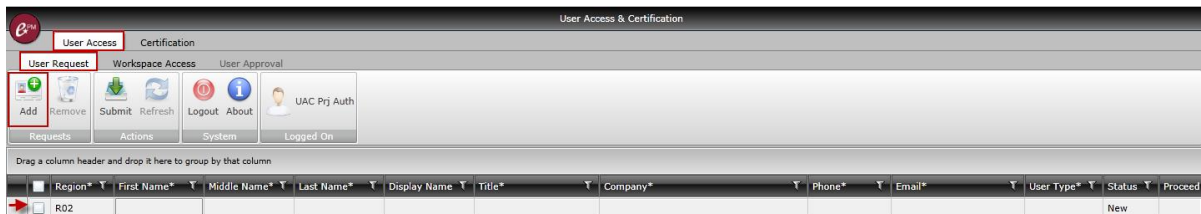
Project Certifiers (Project Managers) and Program Certifiers have the ability to request new users. After requests are submitted, they will be routed through an approval and licensing process before getting activated.

Note: Contact only users will be activated and ready to be added to workspaces immediately

1. Click on the User Access tab.



2. Click on the User Request page, click on the Add icon in the tool bar.



3. In the web grid enter the following information:

Select the Region

Users Full Legal name; First, Middle (if no middle name enter NMN), Last Name

Enter the Display Name

Select a Title from the drop down list

Select a Company by clicking on the Search icon





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Enter the company name in the Search box; select the company and location as displayed below:

Select Company

☐ GSA Companies

Refresh Companies

A & R

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Select	Company Name	DUNS #/AB Code
>	A & R Electric	-

New Location

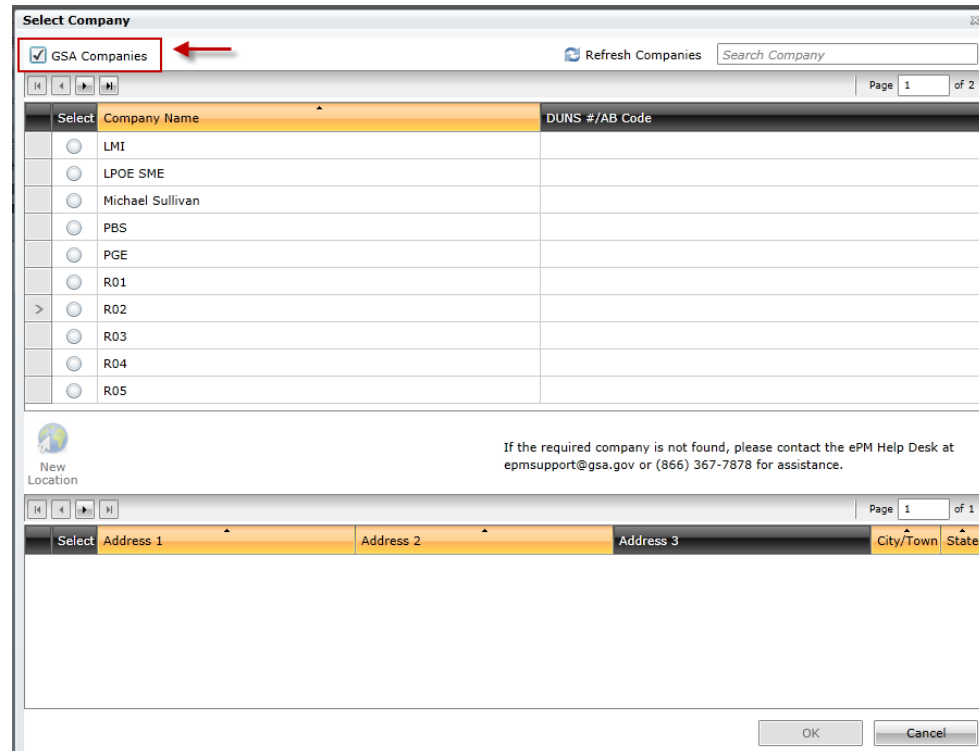
If the required company is not found, please contact the ePM Help Desk at [epmsupport@gsa.gov](mailto:epmsupport@gsa.gov) or (866) 367-7878 for assistance.

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Select	Address 1	Address 2	Address 3	City/Town	State
<input type="radio"/>	55555 144 Street			Washington	DC
<input type="radio"/>	2 AR Shippers Way			Cornelius	NC
<input type="radio"/>	AR Shipping Way	Route 1	Port 5	MyCity	NC
>	22222 Park Avenue			Arlington	VA

OKCancel

NOTE: When adding a staff member put a check box in the GSA Companies to display only GSA locations.




**Select Company**

☒ GSA Companies Refresh Companies

Page 1 of 2

Select	Company Name	DUNS #/AB Code
<input type="radio"/>	LMI	
<input type="radio"/>	LPOE SME	
<input type="radio"/>	Michael Sullivan	
<input type="radio"/>	PBS	
<input type="radio"/>	PGE	
<input type="radio"/>	R01	
<input type="radio"/>	R02	
<input type="radio"/>	R03	
<input type="radio"/>	R04	
<input type="radio"/>	R05	

 New Location

If the required company is not found, please contact the ePM Help Desk at epmsupport@gsa.gov or (866) 367-7878 for assistance.

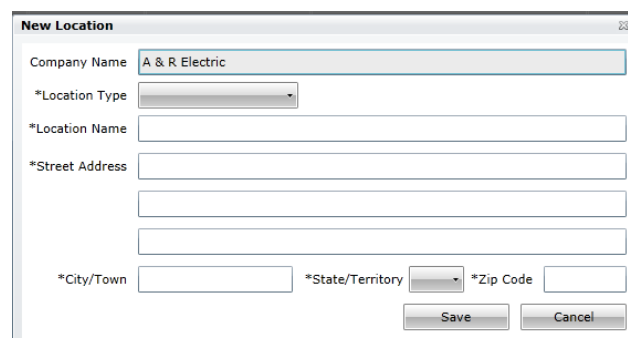
Page 1 of 1

Select	Address 1	Address 2	Address 3	City/Town	State
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel

If the location is not displayed, click on the New location icon.

- Select location type from the dropdown
- Enter location name, street address, city, state and zip code and save.



**New Location**

Company Name

\*Location Type

\*Location Name

\*Street Address

\*City/Town  \*State/Territory  \*Zip Code

Save Cancel

- Enter the phone number, email address and select the User type  
User Types include: Contact Only, Licensed ePM User, Licensed ePM user with Proliance Analytics.

Phone*	Email*	User Type*	Status	Proceed
212-398-7926	RichardBouchard@gsa.gov	<div> Contact Only  Licensed User  Analytics User </div>	New	

5. Click the Submit icon in the tool bar.

The screenshot shows the 'User Access & Certification' interface. The 'Actions' tab is selected, and the 'Submit' icon (a green square with a white checkmark) is highlighted with a red box. Other icons include Add, Remove, Refresh, Logout, About, and UAC NSA.

The user account will be created and in the Draft workflow state:

The screenshot shows the 'User Access & Certification' table. A new user record has been added: R02, William Francis Sargus, Architect, A & R Electric, 410-555-7643, wsargus@arelectric.com, Licensed User, Draft. A red arrow points to the 'Draft' status in the Status column.

6. If the user currently exists in ePM, the Status column will note an error (to view the details hover over the icon in the Status column) the user record must be validated or removed to continue.

The screenshot shows the 'User Access & Certification' table. A duplicate user record is shown: R02, Richard NMN Bouchard, Rich, Architect, R02, 212-679-8543, r.bouchard@gsa.gov, Licensed User. A yellow warning icon is in the Status column. A tooltip is displayed below the table:

The following Contacts or Staff appear to match one or more of your user requests. Please review the potential duplicate(s) and take the appropriate corrective actions.

R02 : Richard Bouchard

7. To validate put a check in the Proceed column



To remove , select the row and click on the Remove icon in the toolbar.



8. When complete click on the Logout icon in the top tool bar.



## User Approval

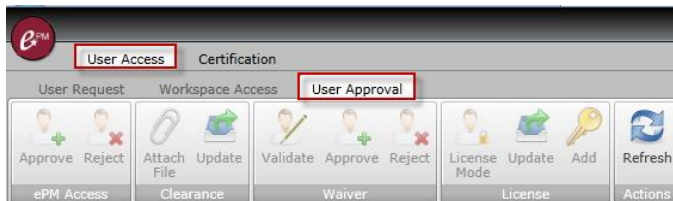
Once User Requests have been submitted, the User Approval process must be completed prior to issuing an ePM User License and granting access to Programs and/or Projects.

The User Approval page is where the:

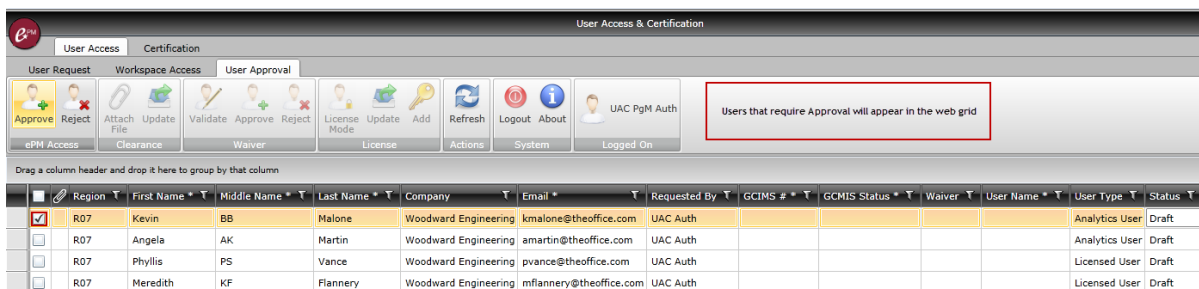
- *Capital or Small Program Certifying Authority* Approves or Rejects ePM Access
- *ePM Regional System Administrators* enter Clearance Information, and Request a waiver
- *Waiver Reviewer* validates the waiver request
- *Waiver Approver* approves or rejects a user
- *National System Administrator* licenses ePM Users

### Approve or Reject ePM Access – Program Certifying Authority Approval

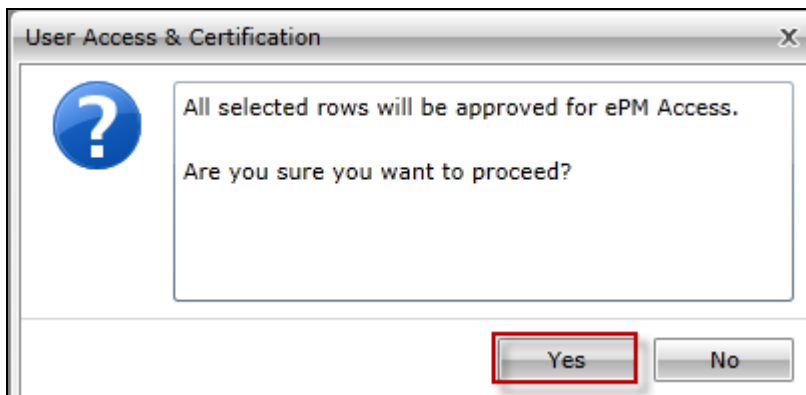
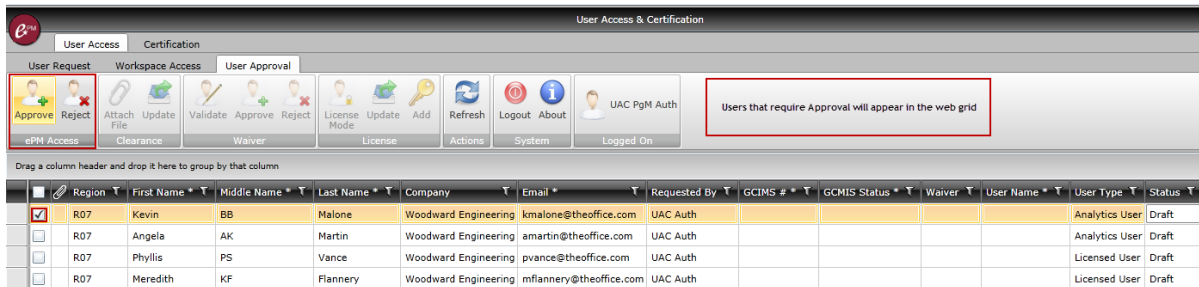
1. At least twice per week, click on the User Access tab and select the User Approval page.



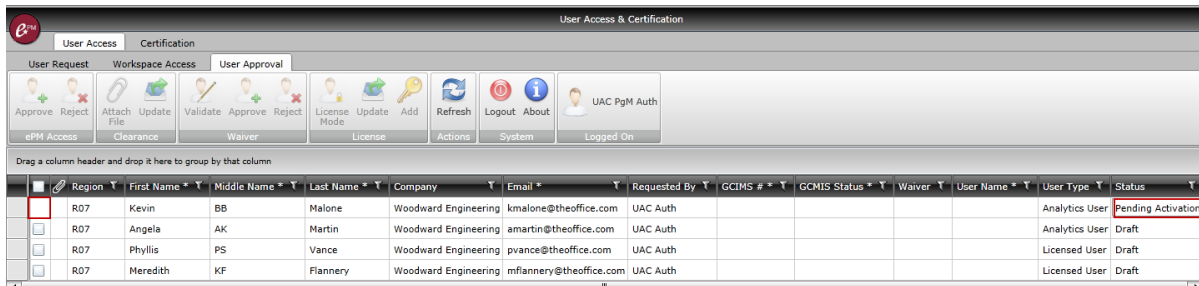
2. Click on the User Approval page, users requiring approval will display in the web grid. Select user(s) by clicking in the select box in the first column.



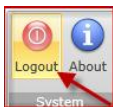
3. Select Approve or Reject in ePM Access in the tool bar and then confirm selection.



4. User Status will be updated to Pending Activation.



5. When complete click on the Logout icon in the top tool bar.



**Provide Security Status and Clearance Documents – ePM Regional System Administrator**





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1. At least twice per week, enter the UPN # from GAMS

Drag a column header and drop it here to group by that column

	Region	First Name	Middle Name	Last Name	Company	Email	Requested By	GCIMS #	GCIMS Status	Waiver	User Name	User Type	Status
<input type="checkbox"/>	R10	B	NMN	Yar	2nd Judicial Circuit Court	bb@yar.com	Daryl Dixon	12121@GSA.GOV	Pending IT Access			Licensed User	Pending Activation
<input type="checkbox"/>	R07	Kevin	BB	Malone	Woodward Engineering	kmalone@theoffice.com	UAC Auth					Analytics User	Pending Activation
<input checked="" type="checkbox"/>	R01	Mario	R	Nidnal	4B Technology	mnidnal@email.net	UAC Auth	7102013@gsa.gov	Full IT Access			Licensed User	Pending Activation
<input type="checkbox"/>	R10	S	NMN	Anej	3D International	sanej@anej.com	Daryl Dixon	123456@GSA.GOV	Full IT Access			Licensed User	Pending Activation
<input type="checkbox"/>	R10	C	NMN	Yar	2nd Judicial Circuit Court	cc@yar.com	Daryl Dixon	12121@GSA.GOV	Initial IT Access			Licensed User	Pending Activation
<input type="checkbox"/>	R10	Moe	NM	Szyslak	Food and Drug Administration (FDA)	kathy_ Kearney@trimble.com	Daryl Dixon	151515@GSA.GOV	No IT Access			Licensed User	Pending Activation
									Other Federal Agency				

2. Choose the GAMS Security Status from the dropdown list, this status will determine what workflow status the user account will transition to once the record is updated.

GAMS Security Status	User Workflow Status	Notes
Full IT Access	Pending License	
Initial IT Access	Pending Waiver	
No IT Access	Active (Contact Only)	GAMS Status is not applicable
Pending IT Access	Pending Clearance	
Other Federal Agency	Pending License	Attach Other Agency GSA Security Email

Table 1.1 – GAMS Security Status options, User Security Workflow Status and Notes

3. To attach Other Federal Agency documentation(s) to a user record in ePM, Select the row and 'Attach File' in the Clearance section

User Access & Certification

User Request    Workspace Access    User Approval

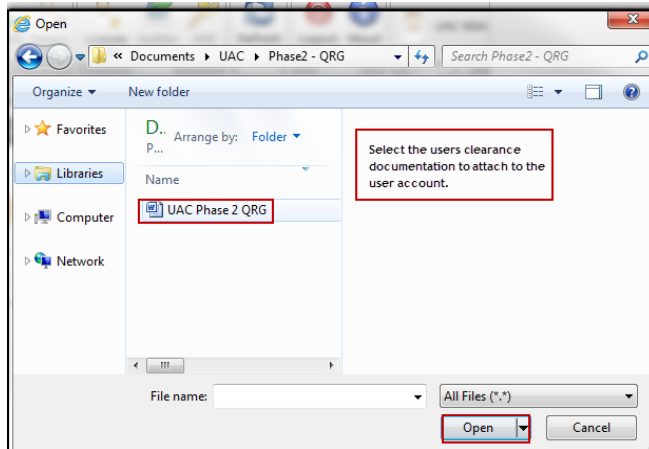
Approve   Reject   **Attach File**   Update   Validate   Approve   Reject   License   Update   Add   Refresh   Logout   About   UAC NSA

ePM Access   Clearance   Waiver   License   Actions   System   Logged On

Drag a column header and drop it here to group by that column

	Region	First Name	Middle Name	Last Name	Company	Email	Requested By	GCIMS #	GCIMS Status	Waiver	User Name	User Type	Status
<input type="checkbox"/>	R10	B	NMN	Yar	2nd Judicial Circuit Court	bb@yar.com	Daryl Dixon	12121@GSA.GOV	Pending IT Access			Licensed User	Pending Activation
<input type="checkbox"/>	R07	Kevin	BB	Malone	Woodward Engineering	kmalone@theoffice.com	UAC Auth					Analytics User	Pending Activation
<input checked="" type="checkbox"/>	R01	Mario	R	Nidnal	4B Technology	mnidnal@email.net	UAC Auth					Licensed User	Pending Activation
<input type="checkbox"/>	R10	S	NMN	Anej	3D International	sanej@anej.com	Daryl Dixon	123456@GSA.GOV	Pending IT Access			Licensed User	Pending Activation
<input type="checkbox"/>	R10	C	NMN	Yar	2nd Judicial Circuit Court	cc@yar.com	Daryl Dixon	12121@GSA.GOV	Pending IT Access			Licensed User	Pending Activation
<input type="checkbox"/>	R10	Moe	NM	Szyslak	Food and Drug Administration (FDA)	kathy_ Kearney@trimble.com	Daryl Dixon	151515@GSA.GOV	Pending IT Access			Licensed User	Pending Activation

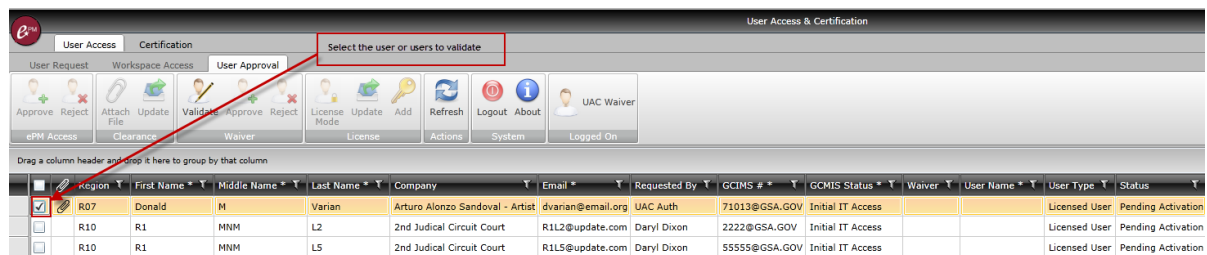
Dialog box will open, select the file to upload and click open



## Waiver Request Validation – Waiver Approver

At least twice per week, the GSA Waiver Reviewer Team must review and validate the waiver request(s).

1. Users that require review and approval will be displayed in the web grid located under the tool bar.



2. In the GAMS System, validate:
  - a. UPN Number
  - b. Initial Investigation and Initial IT Access must be a “Green” check icon
  - c. Investigation Requested – no longer required
    - i. NOTE: All GAMS Contacts, GSA and External, with an “Initial Investigation and Initial IT Access” status of “Green,” have applied for a NACI security clearance or higher

Full Legal Given (First) Name: [Redacted] Full Legal Family (Last) Name: [Redacted] Lookup Clear

[Name.....] [Off Symbol] [Region] [Affiliation] [Status.....] [Investigation..] [Date.....]

[Redacted]

Name

Full Legal Given (First) Name: [Redacted] Full Legal Middle Name (or NMN): [Redacted] Full Legal Family (Last) Name: [Redacted] Suffix: [Redacted] Cordial (Nickname) Name: [Redacted] Display Name: [Redacted]

GSA Employment Information

Affiliation: Contractor Status: Active Region: 01 Office Symbol: 1PSM Major Organization: P Virtual Employee: No Virtual Region: [Redacted]

Work Email Address: [Redacted] Work Phone Number: [Redacted] Work Cell Number: [Redacted] Blackberry PIN: [Redacted] Work FAX Number: [Redacted]

Investigation Requested: [Redacted] Investigation Status: Fingerprint Status Date: 9/8/2014 Determination: [Redacted] MSO Reported Status: Card in Production Agency: GSA

Job Title: ePM Regional Administrator FERO: No Type Contractor: PBS Vendor Name: [Redacted] Contracts Assigned: [Redacted]

GSA Access Card Status

GSA Access Card Needed: [Green Checkmark] GSA Access Card Sponsored: 6/22/2010 [Green Checkmark] GSA Access Card Enrolled: 9/11/2014 [Green Checkmark] GSA Access Card Shipped to Region: 8/5/2010 [Green Checkmark] GSA Access Card Activated: 8/10/2010 [Green Checkmark]

Investigation and IT Access

Initial Investigation and Initial IT Access: 9/8/2014 [Green Checkmark] Final Investigation and Full IT Access: [Red X] Date Unavailable

Access System Information

MSO PID: [Redacted] UPN: [Redacted]@GSA.GOV MSO FASC-N: [Redacted] Authntx (Xtec) FASC-N: [Redacted] C\*Cure (Software House) FASC-N: [Redacted]

3. Select the user or users to validate, by clicking in the select box to the left.

User Access & Certification

User Access Certification User Approval

Select the user or users to validate

Approve Reject Attach File Update File Validate Approve Reject License Mode Update Add Refresh Logout About UAC Waiver

Drag a column header and drop it here to group by that column

	Region	First Name	Middle Name	Last Name	Company	Email	Requested By	GCIMS #	GCIMS Status	Waiver	User Name	User Type	Status
<input checked="" type="checkbox"/>	R07	Donald	M	Varian	Arturo Alonzo Sandoval - Artist	dvarian@email.org	UAC Auth	71013@GSA.GOV	Initial IT Access			Licensed User	Pending Activation
<input type="checkbox"/>	R10	R1	MNM	L2	2nd Judicial Circuit Court	R1L2@update.com	Daryl Dixon	2222@GSA.GOV	Initial IT Access			Licensed User	Pending Activation
<input type="checkbox"/>	R10	R1	MNM	L5	2nd Judicial Circuit Court	R1L5@update.com	Daryl Dixon	55555@GSA.GOV	Initial IT Access			Licensed User	Pending Activation

4. Select Validate in the tool bar and confirm selection.

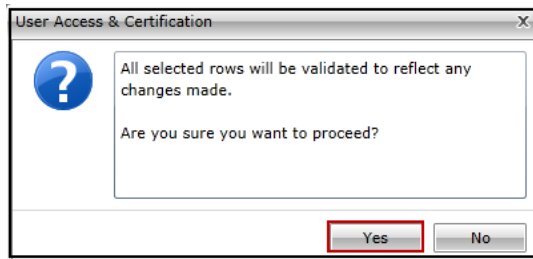
User Access & Certification

User Access Certification User Approval

Approve Reject Attach File Update File Validate Approve Reject License Mode Update Add Refresh Logout About UAC Waiver

Drag a column header and drop it here to group by that column

	Region	First Name	Middle Name	Last Name	Company	Email	Requested By	GCIMS #	GCIMS Status	Waiver	User Name	User Type	Status
<input checked="" type="checkbox"/>	R07	Donald	M	Varian	Arturo Alonzo Sandoval - Artist	dvarian@email.org	UAC Auth	71013@GSA.GOV	Initial IT Access			Licensed User	Pending Activation
<input type="checkbox"/>	R10	R1	MNM	L2	2nd Judicial Circuit Court	R1L2@update.com	Daryl Dixon	2222@GSA.GOV	Initial IT Access			Licensed User	Pending Activation
<input type="checkbox"/>	R10	R1	MNM	L5	2nd Judicial Circuit Court	R1L5@update.com	Daryl Dixon	55555@GSA.GOV	Initial IT Access			Licensed User	Pending Activation



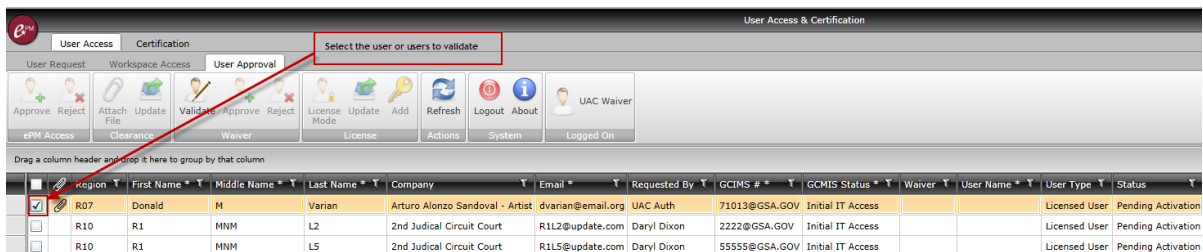
5. When complete click on the Logout icon in the top tool bar.



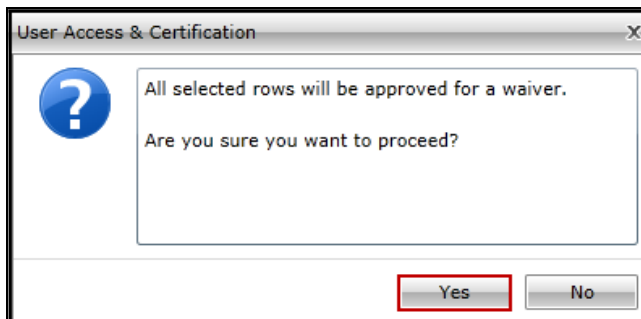
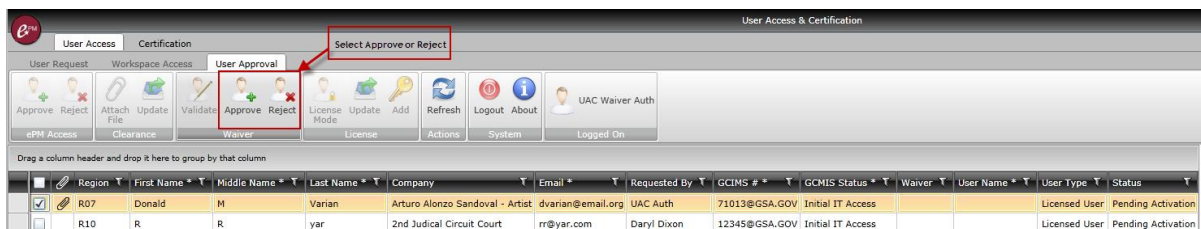
## Waiver Request - Approve or Reject - Waiver Approver

At least twice per week, the GSA Waiver Approver must review and approve or Reject waiver request(s).

1. Users that require review and approval will be displayed in the web grid located under the tool bar.
2. Select the user or users to validate, by clicking in the select box to the left.



3. Select Approve or Reject in the tool bar and confirm selection.



4. When complete click on the Logout icon in the top tool bar.

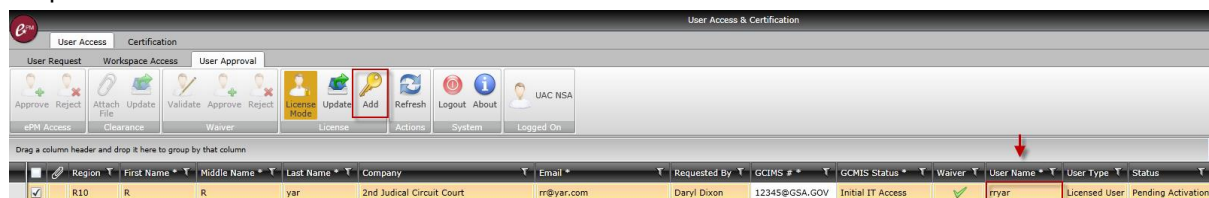


## License an ePM user – National System Administrator

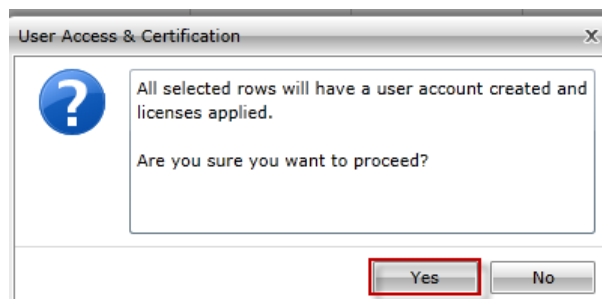
At least twice per week, the National System Administrator licenses ePM users.

1. Select the License Mode
2. Users ready to be licensed will appear in the web grid, to select a user click in the box to the left of the row, or select all users by clicking in the box in the top row.
3. Users must be validated in Active Directory. If the user does not exist in active directory then the National System Administrator will submit a help desk ticket for the user to be setup.
4. Once confirmation of an active AD account has been received the AD account name should be entered in the User Name field.

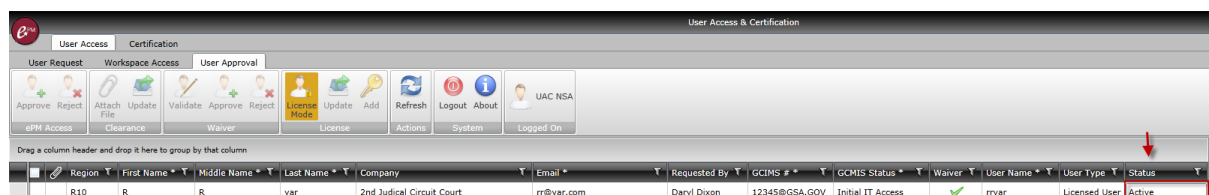
\*Important: User Name must match the AD account name.



5. Select Add and Confirm



6. User (s) are moved to the Active workflow state.



7. When complete click on the Logout icon in the top tool bar.



## Workspace Access

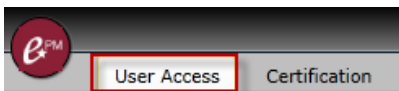
Project Certifiers (Project Managers) and Program Certifiers are the only ones that can **grant** users access to their Projects or Programs.

Administrators can only **request** Project and Program access but Project and Program Certifiers are the only ones that can grant user access to their own Projects and Programs.

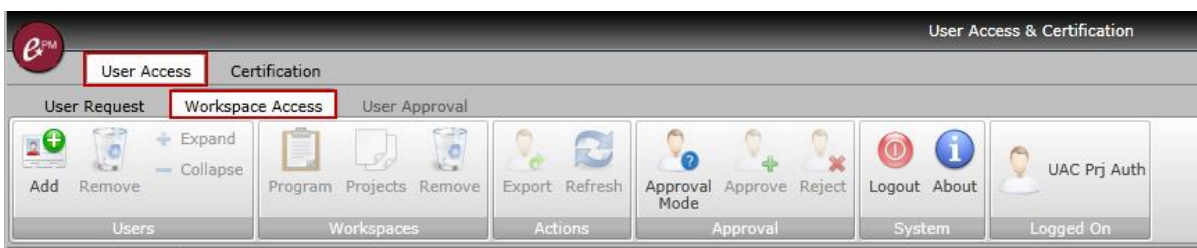
Note: "Contact Only" user types will be exported to the desired Project or Program with no approval required.

The Workspace access page provides the ability to request, approve and export ePM users to Programs and Project workspaces.

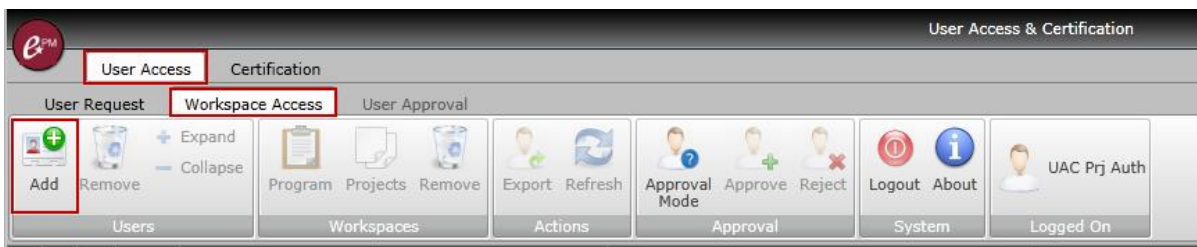
1. Click on the User Access tab.



2. Click on the Workspace Access page



3. Click on the Add icon in the tool bar.



4. Select a user, use the search box in the upper right hand corner or scroll page to page using the arrows on the left.

**Note:** If a User cannot be found, try searching by last name only, first name only or nickname only

5. Click Add in the left column to select the user(s) to process.
6. Once selected, the user(s) will be displayed on the bottom half of the screen, click OK to continue

Region	Display Name	Title	Company Name	Current State
R01	Richard Bartram	Project Superintendent	Physical Security, LLC	Active
R10	Richard Beseler	Project Management Specialist	R10	Active
R03	Richard Bolger	Project Manager	KlingStubbins, INC	Active
R02	Richard Bouchard	Architect/Engineer	R02	Active
R07	Richard Bowles	Project Team Member	Turner Construction Company	Pending Activation
R10	Richard Broderick	Architect	R10	Inactive
R11	Richard Brooks	Deputy Director	R11	Active
11	Richard Brown	Project Manager	R11	Active
R03	Richard Bullen	Project Manager	Grunley Construction Co. Inc.	Active
R05	Richard Burch	Project Superintendent	DCK NORTH AMERICA, LLC	Active

Region	Display Name	Title	Company Name	Current State
R07	Richard Bowles	Project Team Member	Turner Construction Company	Pending Activation

User(s) selected will now appear in the grid

Region	Display Name	Title	Company	User Account	Security Category*
R07	Richard Bowles	Project Team Member	Turner Construction Company	No	

7. To request Workspace access; select the user (click in the box in front of Region) and then select requested Workspace (Program or Project)

**Note:** Only "Contact Only" and "Active Licensed" ePM users that have been approved by the Program or Project Authority can be exported to Program or Project workspaces.

Region	Display Name	Title	Company	User Account	Security Category*
R07	Richard Bowles	Project Team Member	Turner Construction Company	No	

Workspace Number	Workspace Name	Status



- Select the Region click on the Add button (use the search box to narrow selection) for Project Access click the Next button to select project(s)

**Select Program**

Search Program

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	Program Number	Program Name
>	R0004Small	Region 04 - Southeast Region Small Project Program
Add	R0005Capital	Region 05 - Great Lakes Region Capital Project Program
Add	R0005Small	Region 05 - Great Lakes Region Small Project Program
Add	R0006Capital	Region 06 - Heartland Region Capital Project Program
Add	R0006Small	Region 06 - Heartland Region Small Project Program
Add	R0007Capital	Region 07 - Greater Southwest Region Capital Project Program
Add	R0007Small	Region 07 - Greater Southwest Region Small Project Program
Add	R0008Capital	Region 08 - Rocky Mountain Region Capital Project Program
Add	R0008Small	Region 08 - Rocky Mountain Region Small Project Program
Add	R0009Capital	Region 09 - Pacific Rim Region Capital Project Program

Remove R0007Capital Region 07 - Greater Southwest Region Capital Project Program

OK Cancel

Select the Project(s) click on the Add button (use the search box to narrow search), click OK

**Select Projects**

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	Project Number	Project Name
>	15848	NY-Holtville IRS HVAC and Parking
Add	15539	NY-Holtville IRS R&A
Add	2803	NY-Holtville-IRS Service Center-Tune Up/Systems

Remove All Project Number Project Name

Remove 15539 NY-Holtville IRS R&A

Remove 2803 NY-Holtville-IRS Service Center-Tune Up/Systems

OK Cancel

User(s) selected and requested workspace access will now appear in the grid

**User Access & Certification**

User Access Certification

User Request Workspace Access User Approval

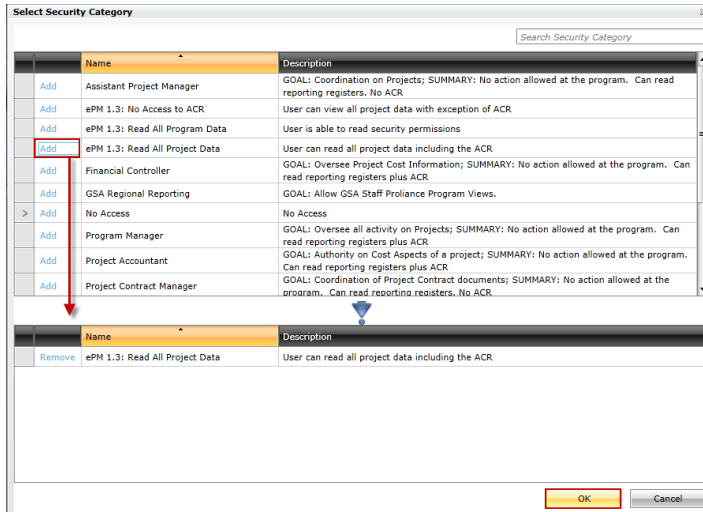
Add Remove Expand Collapse Program Projects Remove Export Refresh Approval Mode Approve Reject Logout About UAC Prj Auth

Users Actions Approval

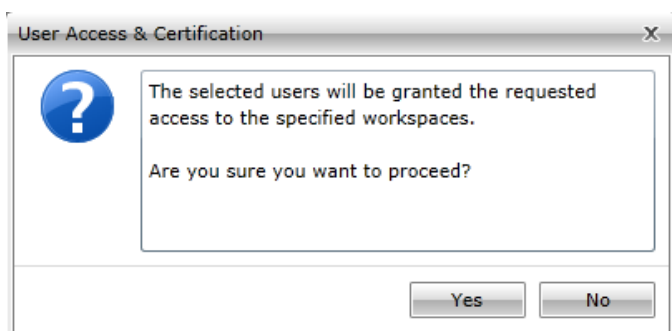
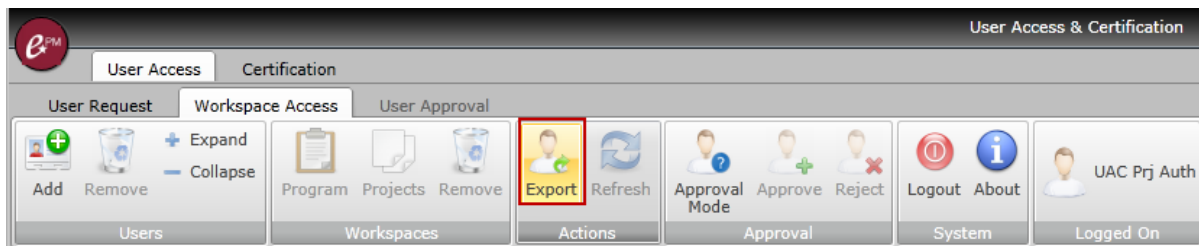
Region	Display Name	Title	Company	User Account	Security Category*
R02	Richard Bouchard	Architect/Engineer	R02	Yes	

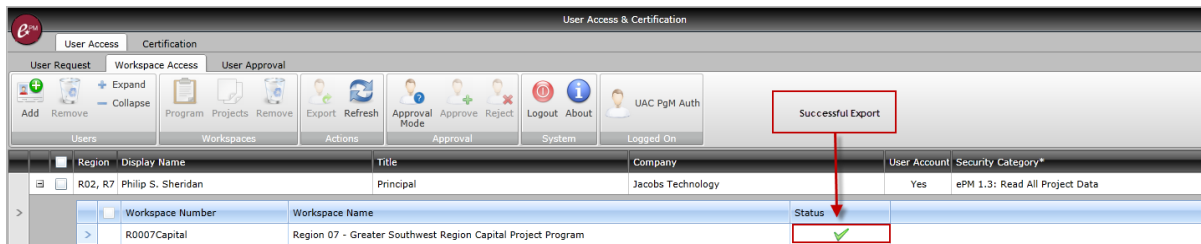
Workspace Number	Workspace Name	Status
2803	NY-Holtville-IRS Service Center-Tune Up/Systems	New
15539	NY-Holtville IRS R&A	New

9. Select a Security Category, by clicking on the 



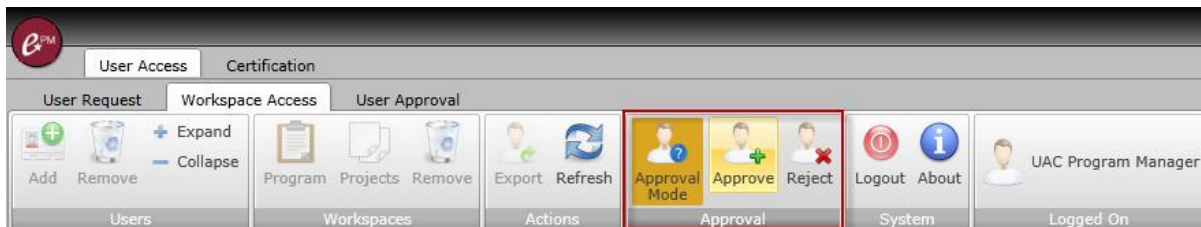
10. Select Export in the tool bar and confirm





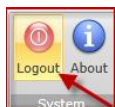
NOTE: When a User Request is submitted the Project or Program Certifier must process the approval before the user account can be exported.

The Project or Program Certifier will receive an **email** notifying them of the action requested



11. The Project or Program Certifier will log into UAC and Approve or reject the selected user's access to a Project or Program.

12. When complete click on the Logout icon in the top tool bar.



### Tips

1. Internet Explorer version 9 (or higher) is the recommended web browser
2. Verify that the correct email address has been entered into ePM
3. When performing any action for a user in UAC be sure to check in the select box for the user(s) account
4. Only Project Certifiers (Project Managers) and Program Certifiers can request a new user account
5. Only Program Certifiers can Approve or a Reject a new user request
6. Only the Waiver Reviewer can Validate a waiver request
7. Only the Waiver Approver can Approve or Reject a waiver request
8. Only an ePM Regional System Administrator or National System Administrator can update clearance information
9. Attached files can be located in ePM on the user's attachment tab of the user's record
10. Only the National System Administrator has the authority for providing an ePM License
11. For information on Security Categories and roles contact the Regional ePM System Administrator

Questions/issues please contact [epmsupport@gsa.gov](mailto:epmsupport@gsa.gov)